

Who You Are.
The Hidden Identity Shift
Behind Higher-Value Clients.

NAPIB 2026 Keynote

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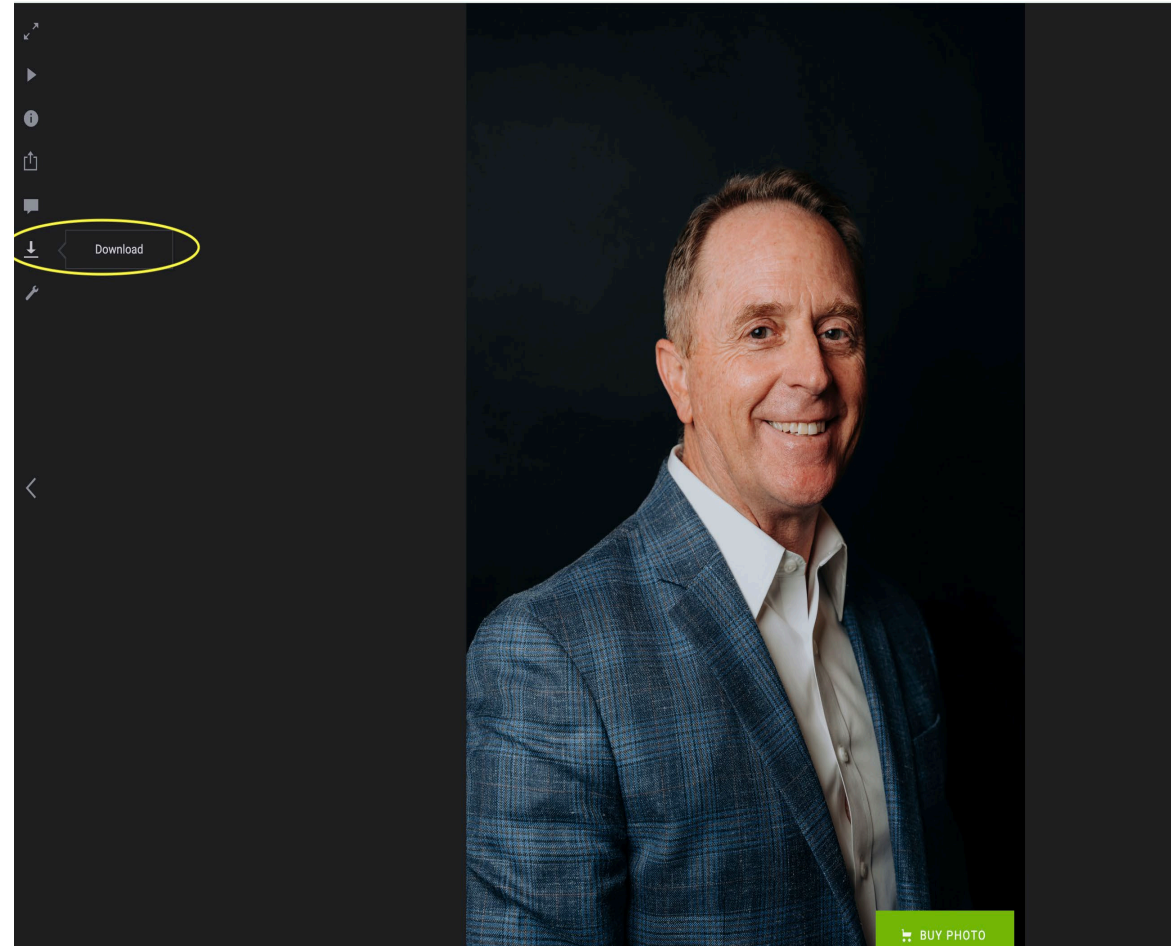
INTRODUCTION

Meet Brian.

- 30 years in the business
- Humble. Respected. Stuck.
- Average client around \$350K
- Seen as an insurance agent — not a trusted strategic advisor

THE HONEST TRUTH

“I felt inferior. I don’t mean as a person — I just didn’t feel like I had the courage, or the knowledge, or the... competence to be able to say: I help people like you.”





THE STUCK STATE

What Brian was feeling.

01

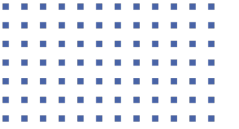
Too many low-profit clients
and boring review meetings

02

Not enough engaging work
solving bigger problems

03

Missing the buzz of
prospecting



THE FRAMEWORK

Brian's story is built on three shifts.

Today, you'll learn to make the same ones.



MINDSET

Own your role as a strategic advisor



WHO

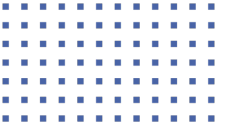
Focus on the few who open the right doors



POWER HABIT

The weekly review that compounds everything

Knowing-what-to-do-was-never-the-problem(-Doing-it-consistently-is)



“ I can handle better relationships.”

You deserve to position your value at a higher level. The mindset shift unlocks everything else.

BRIAN'S WORDS

“I had a block. I had not unlocked myself to say: all the successes I've had, all the people I've had a chance to work with — that shows that I have the knowledge and the skill set, the personality, the integrity. I've got all that to work with these people.”

— Brian, Financial Advisor / Insurance Agent

POLL 1

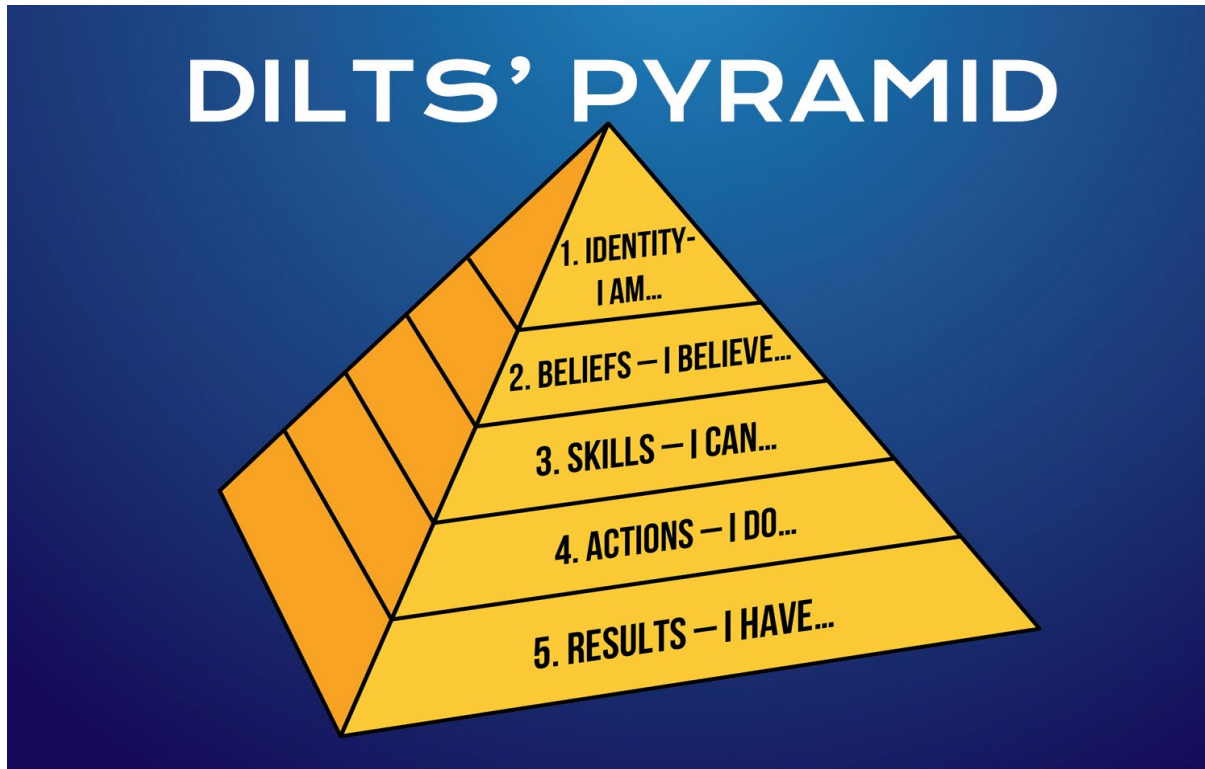
What belief would empower you to prospect higher-value relationships?

- a) Asking can get me where I want to go
- b) I deserve to work with bigger clients
- c) I want to be more of a full benefits consultant
- d) I am a trusted strategic advisor



WHY THIS WORKS

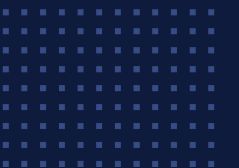
Why identity matters so much.



Change at the top changes everything below.

Identity is upstream of behavior

What are the 4 most common blocks to upgrading your own identity?





THE 4 BLOCKS

The voices that hold advisors back.



I don't know if I belong at bigger tables.

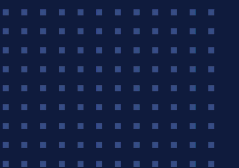
I'm scared of being seen as a salesperson.

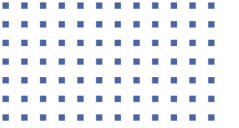
I have the wrong scoreboard.

I'm a people-pleaser, chasing rabbits, spinning plates.

THE UPGRADE

How to solve this.





THE NEW IDENTITY

The 4 beliefs that change everything.

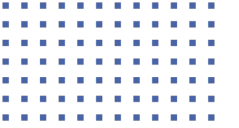


I've earned the right to be at bigger tables.

I'm a strategic trusted advisor.

I measure myself by the effort and value I bring.

I focus on the 'right fit' people and opportunities.



BRIAN'S TRANSFORMATION

The identity upgrade for higher-value clients.

BEFORE

- ✗ Feels uncomfortable asking for bigger prospects
- ✗ Waits for clients to refer spontaneously
- ✗ Doesn't strategize about the best relationships
- ✗ Unconsciously measures self by others' metrics

AFTER

- ✓ Recognizes they belong doing higher-level work
- ✓ Asks specifically — and gets specific results
- ✓ Pursues the 5–15 relationships that move the needle
- ✓ Puts up their own scoreboard

The clients you attract are almost always a reflection of how you see yourself professionally.



REFRAME

The identity upgrade for fear of being salesy.

You are genuinely helping others to improve their lives.



MINDSET

When you make the call, you're showing up with something incredibly valuable.



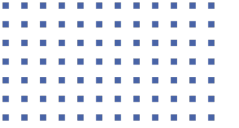
IDENTITY

Do you believe they will be better off? Not calling is doing a disservice.



BEHAVIOUR

Go in with an ask, not a vague catch-up. You're coming as a resource.



REFRAME THE ASK

The identity upgrade for a better scoreboard.

"I shifted the ask from being about ME to being about reducing people's financial stress. I realised I was WITHHOLDING value by not asking."

1

Reduce financial stress from 9/10 to 4/10

2

Solve real problems for people

3

Deliver significant peace of mind

4

Protect their families financially

5

Give a good listening ear

6

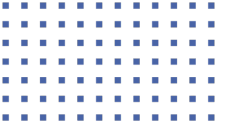
Help people feel less alone in big decisions

7

Create certainty when people feel uncertain

8

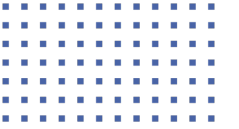
Empower more people like you



FOCUS

The identity upgrade to stop people-pleasing.

- 01 | Focus is what you're willing to cut.
- 02 | Stay optimistic. Be surgical with your time.
- 03 | Follow the money in your network.
- 04 | Fewer doors. Deeper relationships. Bigger book.



Top performers use better filters — not bigger networks.

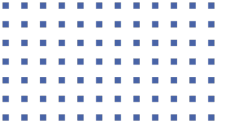
BRIAN'S SYSTEM

Instead of spreading attention across his full network, Brian built a Top 12 list of his best contacts and committed to a weekly review of those relationships.

This focus got him his biggest results.

HIS ONE LINE

™That definitely sounds like somebody I should meet!°



THE BOX

How Brian identifies specific names.

ASK YOURSELF

1. Who in your world knows clients bigger than yours?
2. Who has referred you before?
3. Who knows people you'd love to meet?
4. Who has the same problem as your biggest clients?

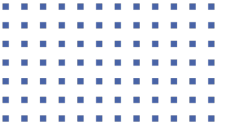
THE BAD ASK

"If you know anyone that would benefit from my services..."

THE GOOD ASK

"Who are you closest to at ABC Company that you'd be most comfortable introducing me to,"

Specific asks get specific introductions!



The compound interest of consistent action.

BRIAN'S WEEKLY REVIEW HABIT

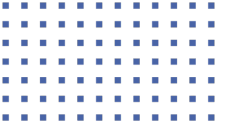
Every week, Brian reviews his Top 12 list and asks:

1. How can I interact with this person next?
2. How can I put more water in the well?
3. What's my next specific ask?

Simple(-Repeatable(-Compounding(

Growth is not the result of motivation.

It's-the-result-of-repeatable-action(



POLL 3

What would be a great power habit for you?

- a) 3 specific asks per week
- b) X meetings per week with higher-value targets
- c) Top 15 time



THE PROOF

Brian's results.

62%

Revenue growth in 3 years —
after 30 years in business

100+

Clients with \$1m+ AUM (was
just 2 in 2019)

\$150m

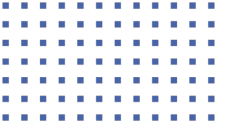
Business sale won — 2025

\$4.0m

Commission checks on 3 life
cases — past 9 months

™The shift sounds small (-The results have been through the roof)°

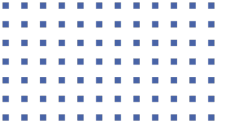
— Brian, Financial Advisor, US, 30+ years



THE COMPOUND EFFECT

When the gears sync,
momentum takes over.





YOUR NEXT MOVE

What to do next: install the system.

1

MINDSET · Upgrade One Belief

Write down the belief that will help you aim higher — and align your actions with it daily.

2

WHO · Focus on Five Relationships

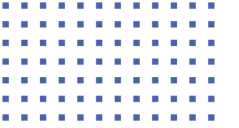
Build your Top 15 list. Start with five. These are your real connectors. Protect time for them.

3

HABIT · Track One Habit

Block 15 minutes each week for your Top 15 review. Make your asks specific. Write names down.

Because knowing what to do was never the problem (-Doing-it- week-in)-week-out- is(



ADOPT THESE BELIEFS

Your new identity, ready to install.



I've earned the right to be at bigger tables.

I'm a strategic trusted advisor.

I measure myself by the effort and value I bring.

I focus on the 'right fit' people and opportunities.

THE CHALLENGE

“I want to be the next Brian.”

Brian didn't get a new designation.

He didn't change who he was. He took action and surrounded himself with more expertise.

He shifted one belief: I belong at bigger tables.

He focused on 12 relationships — not his whole network.

He ran one weekly review habit.

The question isn't whether you can (It's whether you will)



How the Referral HQ can help you be the next Brian



Programme: For individuals

Learn the proven system, change your mindset and increase your referral flow.

7 sessions, 71 days

Next Programme date:
8 June 2026

10% discount for NAPIB members

Matt Anderson

Founder

Book: Fearless Referrals
Coach to Financial Advisors & Insurance Agents
Speaker: MDRT, NAIFA, St. James's Place, Mass Mutual



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